

YOUR WEALTH MINDSET QUIZ

Select the level that most relates to your current phase of life.

WEALTH MINDSET:

1 **MY WEALTH**
A Plan to Stabilize Abundance and Create in Prosperity.



2 **MY MONEY**
Any article or substance used as a Medium of exchange, measure or wealth or means of payment.



3 **MY ASSET**
Anything Valuable or Useful.



4 **MY INVESTMENT**
The Investment of money or capital in order to a gain profitable returns, as interest, income or appreciation in value.



5 **MY SAVINGS STRATEGY**
A Plan, Method or series of maneuvers or stratagems for obtaining a specific goal or result.



LEVELS:

- Level 1 - You do not have a plan.
- Level 2 - You want to create a plan.
- Level 3 - You have a basic plan.
- Level 4 - Your plan empowers you and your legacy no matter what happens in the world.

- Level 1 - You live check to check.
- Level 2 - You have a small savings.
- Level 3 - You have solid cash flow.
- Level 4 - You live in absolute abundance with money.

- Level 1 - You don't invest in yourself.
- Level 2 - You set a small amount aside.
- Level 3 - You invest in yourself but are still plagued with guilt of the past.
- Level 4 - You invest in yourself as a #1 priority.

- Level 1 - You feel clueless on investing.
- Level 2 - You are uneasy with investing.
- Level 3 - You have experience investing.
- Level 4 - Your #1 investment is your business.

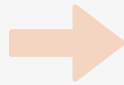
- Level 1 - You have no strategy.
- Level 2 - You've started creating one.
- Level 3 - You have a clear strategy.
- Level 4 - You have a solid, proven strategy that is clear and written down.

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WEALTH MINDSET:

6 MY INSURANCE
Coverage by contract in which one party agrees to indemnify or reimburse another for loss that occurs under the terms of that contract.



7 MY DEBT
An obligation to pay or perform on something such as money.



8 MY TAX STRATEGIES
Success tools utilized at a high level with the Internal Revenue Service.



9 MY MAXIMUM POTENTIAL
The Full Economic Potential of all the cash that will pass through your hands.



10 MY LEGACY
The life we live and die by today worthy of a Legacy for future generations.



LEVELS:

- Level 1 - You have zero protection.
- Level 2 - You have some insurance.
- Level 3 - You see insurance as an investment.
- Level 4 - You have built an empire of protection.

- Level 1 - You are controlled by debt.
- Level 2 - You want help with debt.
- Level 3 - You pay down on all debt.
- Level 4 - You leverage your debt and never borrow for destructive purposes.

- Level 1 - You don't file taxes.
- Level 2 - You file but have no strategy.
- Level 3 - You use some tax strategy.
- Level 4 - You are strategic in your plan and have a team that you meet with quarterly.

- Level 1 - You spend everything.
- Level 2 - You save very little.
- Level 3 - You use strategy and save well.
- Level 4 - You are achieving maximum potential with taxes and savings.

- Level 1 - You have no legacy thoughts.
- Level 2 - You understand legacy.
- Level 3 - You have a hand written will.
- Level 4 - You have a legacy mindset that drives you in all areas of your life.

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SCORING YOUR RESULTS

What have you become more aware of after taking this assessment?

If have the most
Level 1's



YOU'RE ASLEEP

It's time to wake up and take action!!
What's your next best step
now that you are aware?

If you have the most
Level 2's



YOU'RE AWAKE

Let's light the fire!
How can we take action to move
your towards your goals?

If you have the most
Level 3's



YOU'RE ACTIVE

Take it to the next level!
You're off to a great start,
now let's move up to the next level!

If you have the most
level 4's



YOU'RE ACCELERATED

Secure your position of strength!
How do we protect and grow what you have
and leave a legacy?

WHAT NOW?



IT'S UP TO YOU

Option 1: Do nothing.
Option 2: Take action.
The choice is yours.